

Salesforce on Alibaba Cloud Technical Migration Data Sheet

Background

Salesforce is bringing the Customer 360 to China in partnership with our Strategic Technology Partner Alibaba Cloud. [Salesforce on Alibaba Cloud is generally available](#) (GA) in December 2023. It consists of two parts:

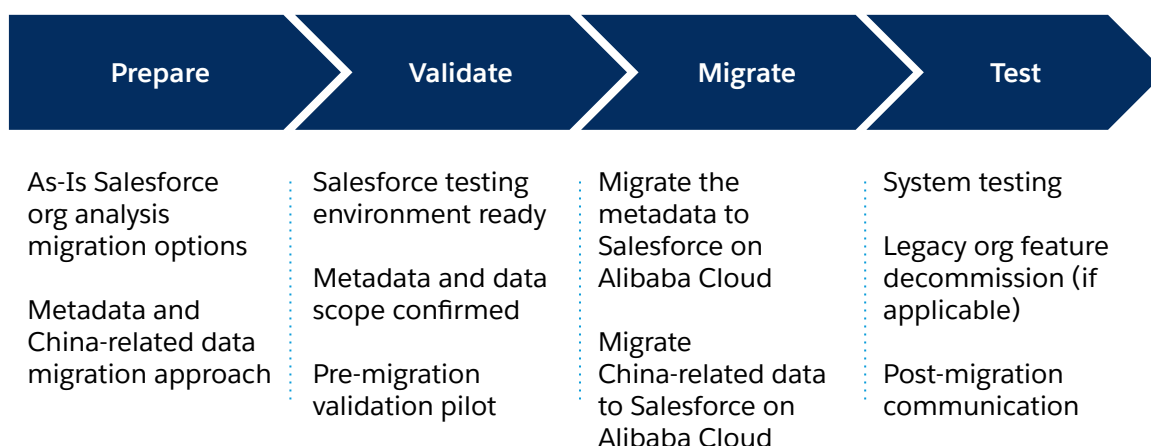
- Salesforce’s global core products including Sales Cloud, Service Cloud, and Salesforce Platform.
- Connected Experiences Gateway (CXG), our integration products designed specifically for China, including Social Commerce and Social Integration.

To successfully migrate to Salesforce on Alibaba Cloud is not a simple task like ‘lift - shift - land’. It is an end-to-end migration project. This data sheet is designed to help you understand and prepare for this migration project from a high level perspective.

To access the full the 30-page “Technical Migration Guide”, please reach out to your sales representative.

Salesforce on Alibaba Cloud Migration Journey

Your end-to-end migration journey might consist of four steps:





Prepare

Validate

Migrate

Test

Prepare for Your Migration

Every customer's Salesforce org is unique. You could have a global shared org that has been used for 10+ years including China usage, you could already have a dedicated org for users in China, or there could be no Salesforce org for China usage at all. You need to understand your As-Is Salesforce org environment to decide the migration approach of building your To-Be Salesforce on Alibaba Cloud instance.

At the preparation stage, the expected outcomes are to:

- Understand your Salesforce As-Is org environment
- Understand your Salesforce on Alibaba Cloud migration options
- Agree on the migration approach for metadata/data migration
- Agree on the relationship and data synchronization scope between your existing global Salesforce instance, and the Salesforce on Alibaba Cloud instance

To archive the expectations, the following stakeholders will need to be involved:

- Internal - IT team, Salesforce Architecture
- External - System Integrator (who implemented your current Salesforce org)

And the steps you are required to take include, but not limited to:

- Confirm your As-Is Salesforce org types (global shared, dedicated, no Salesforce org for China)
- Workshop to decide your preferred method of metadata migration based on your existing org type
- Workshop to understand the data history in your As-Is org and agree on the appropriate method to define the China-related data for migration

You can start the preparation stage as soon as you've made the decision to migrate your Salesforce org to Salesforce on Alibaba Cloud. You should consider the time to investigate your As-Is Salesforce org, to align all the stakeholders on the migration approach, and to complete the migration budget approval process.



Prepare

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Validate Your Migration Approach

Salesforce on Alibaba Cloud will be as similar to the Salesforce global version as possible, with some differences, for example:

- No Einstein Service as this will require cross border customer data transfer
- Lightning support only. If your As-Is Salesforce org is still on Classic, you will need to upgrade to Lightning first before you can migrate to Salesforce on Alibaba Cloud
- Some features like Omni-Channel might not initially be available at the time of GA
- The ISV package in your global Salesforce org might not be available in China

Therefore, the migration scope for both metadata and data will need to be well defined and validated, and a migration plan created for those features which are out of the migration scope.

At the validation stage, the expected outcomes are:

- Workshops have been held to confirm and sign-off on the migration scope for metadata and China-related data
- Major blockers have been identified and documented, for example, the Salesforce As-Is org is not Lightning ready, the solution components (Marketing, Commerce, CPQ, FSL, etc), or the ISV packages are not yet available at the time the Salesforce on Alibaba Cloud instance becomes Generally Available
- A mitigation plan (Lightning upgrade, alternative solutions, change management) has been created with the Salesforce team, Alibaba Cloud team, and your SI partner
- The migration plan has been thoroughly tested and optimized together with your selected Salesforce SI

Some tools you can use to help:

- An org compare tool that compares your As-Is org with a clean Salesforce org to identify the initial scope of customizations to be migrated
- A free or commercial tool to test the metadata and data migration process

We recommend you start the validation stage **no later than 3 months before** your targeted migration project start date.



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Migrate to Your Salesforce on Alibaba Cloud Environment

Although each customer org is different, there are several rules that are important for every migration project:

1. Don't just copy everything and assume it will work. e.g. some standard fields might not be available in the Salesforce on Alibaba Cloud instance org environment. And some standard or custom fields might exceed the length limit due to special requests in your global Salesforce instance.
2. When you try to conduct the org split task, if some metadata configurations can not be confirmed if they are related or not related to China scope, MIGRATE THEM FIRST.
3. There might be incremental data during the migration. Plan ahead how to handle this situation, or simply contact Salesforce to enable the 'read-only' mode during data migration.
4. It's important to import object data in a particular order to maintain record relationships. For example, import the parent record before the child record, import the mandatory field record first, etc.

Tools that can be used for the migration:

- System tools (APIs, SFDX, Wizard, Dataloader)
- Free 3rd party tools (Workbench, Ant Migration Tools, etc)
- 3rd party commercial tools (Gearset, Copado, Odeseva, etc)
- Org Compare Tool and Data Compare Tool (3rd parties)

Typical migration period:

- It depends, could be 2 months, 3 - 6 months, or longer
- Consider the phase approach (Migrate & Optimize)

Migration Steps:

1. Understand and avoid the limitations (Read <[Salesforce Limitations](#)>)
2. Run the pre-migration checklist:
 - Custom connected app is ready to connect the SFDX tooling for migration
 - No hard-coded URL
 - Enable the relevant settings (multi-currency, supported languages, personal accounts, etc.)
 - Apply the special request to increase the system limits (APIs, pickup values, field length, etc.)
 - Disable the triggered flow to avoid unexpected incremental data
3. Migrate metadata and data in the right order
4. Update the metadata before import, like creating/updating username/email for new org, new custom object/field for some China-related data importing
5. Decide approach to maintain the data relationship (parent child)
6. Handle the special data like encrypted data, audit data, system generated data, etc.
7. Understand which data cannot be migrated (opportunity history, field history, etc.)
8. Add Preferred Alternatives to IP Allowlisting on Salesforce on Alibaba Cloud instance



Testing and Post-Migration Tasks

We cannot emphasize enough how important it is to have everything tested properly. While understanding that each migration project scope is unique and we may not cover every circumstance, we have provided a sample testing guide in the complete Technical Migration Guide for you to download.

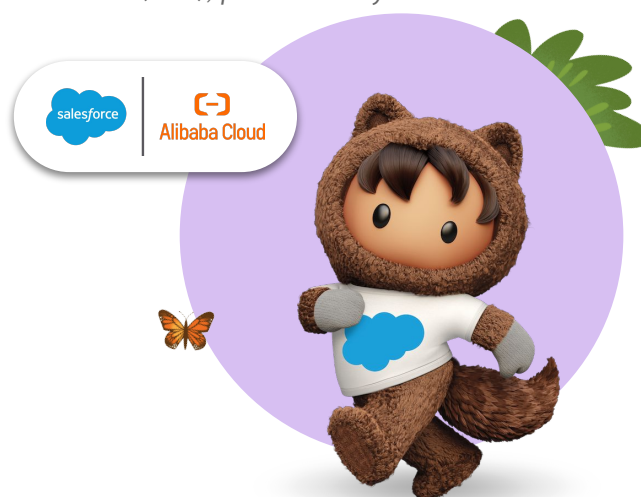
PLEASE DO consult your migration team or certified SI to build your own testing plan.

At the testing stage, the expected outcomes are:

- You have built out your own test plan using the Technical Migration Guide as a reference
- You have made a plan to handle exceptions after migration
- Changes have been communicated to the internal stakeholders (Global Salesforce Team, IT team, China business users):
 - Sent email after verification is complete reminding end users about the change in the URL
 - End User Impact: Have reminded support community and leadership team that URL will change, but bookmarks, links in Chatter posts, templates, etc will redirect to the new instance
 - Have tested and communicated with internal and external impacted parties that Mydomain will be changed and it will impact your Experience Cloud access link
 - Have notified (Chatter, Email, or other communication methods preferred by your organization) all employees that: the Salesforce on Alibaba Cloud application is accessible, the login URL has changes, and all browser bookmarks will redirect (assuming you follow our best practices of whitelisting IP addresses)
 - Have communicated similar (or different) local process and differences between Global org and Local Org
- Local internal team enablement in complete
- A future plan (Enhancement, Exceptions Management) has been created

As always, thanks for your support for Salesforce on Alibaba Cloud!

Continue to read our *China Architecture Guide* to learn more about the Salesforce on Alibaba Cloud platform, product strategy and roadmap, integration patterns, the operations practices of IT and data governance and release management, and local practices including Center of Excellence (CoE), partner ecosystem and user experience and adoption in China.





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